

NAME \_\_\_\_\_

SOCIAL SEC # \_\_\_\_\_

DATE OF REFUND \_\_\_\_/\_\_\_\_/\_\_\_\_

AMOUNT REFUNDED (1)\$ \_\_\_\_\_ X

| YEAR | Factor<br>Line (2) | Factor for<br>Line (5) | (2*) _____ %                        | (3)\$ _____ + |
|------|--------------------|------------------------|-------------------------------------|---------------|
| 1946 | .25000             | 8.992435               |                                     |               |
| 1947 | .25000             | 8.730512               |                                     |               |
| 1948 | .21667             | 8.509271               | 12/31/_____                         | (4)\$ _____ X |
| 1949 | .20833             | 8.301763               |                                     |               |
| 1950 | .22500             | 8.083485               |                                     |               |
| 1951 | .20000             | 7.894026               | 12/31/00 (5) _____ =                | (6)\$ _____ X |
| 1952 | .20833             | 7.701491               |                                     |               |
| 1953 | .20833             | 7.513652               |                                     |               |
| 1954 | .22500             | 7.316110               | (7**) _____ %                       | (8)\$ _____ + |
| 1955 | .23333             | 7.116856               |                                     |               |
| 1956 | .23333             | 6.922996               |                                     |               |
| 1957 | .23333             | 6.734440               | DATE OF<br>REPAYMENT ____/____/2001 | (9)\$ _____   |
| 1958 | .23333             | 6.551003               |                                     |               |
| 1959 | .23333             | 6.372573               |                                     |               |
| 1960 | .25000             | 6.186966               |                                     |               |
| 1961 | .25833             | 6.000931               |                                     |               |
| 1962 | .27500             | 5.809225               |                                     |               |
| 1963 | .28333             | 5.618219               |                                     |               |
| 1964 | .29167             | 5.428228               |                                     |               |
| 1965 | .30833             | 5.234551               |                                     |               |
| 1966 | .30833             | 5.047779               |                                     |               |
| 1967 | .31667             | 4.863000               |                                     |               |
| 1968 | .32500             | 4.680466               |                                     |               |
| 1969 | .33300             | 4.500435               |                                     |               |
| 1970 | .35833             | 4.314880               |                                     |               |
| 1971 | .37500             | 4.129086               |                                     |               |
| 1972 | .41667             | 3.932484               |                                     |               |
| 1973 | .44167             | 3.734536               |                                     |               |
| 1974 | .45000             | 3.543196               |                                     |               |
| 1975 | .45833             | 3.358489               |                                     |               |
| 1976 | .50000             | 3.168406               |                                     |               |
| 1977 | .50833             | 2.986220               |                                     |               |
| 1978 | .53333             | 2.806595               |                                     |               |
| 1979 | .53333             | 2.637780               |                                     |               |
| 1980 | .55833             | 2.472135               |                                     |               |
| 1981 | .60000             | 2.306100               |                                     |               |
| 1982 | .70000             | 2.127412               |                                     |               |
| 1983 | .79167             | 1.942835               |                                     |               |
| 1984 | .45833             | 1.841551               |                                     |               |
| 1985 | .45833             | 1.745545               |                                     |               |
| 1986 | .45833             | 1.654546               |                                     |               |
| 1987 | .45833             | 1.568290               |                                     |               |
| 1988 | .43333             | 1.490770               |                                     |               |
| 1989 | .44166             | 1.415735               |                                     |               |
| 1990 | .45000             | 1.343203               |                                     |               |
| 1991 | .45000             | 1.274386               |                                     |               |
| 1992 | .39167             | 1.217178               |                                     |               |
| 1993 | .25833             | 1.180580               |                                     |               |
| 1994 | .20833             | 1.151786               |                                     |               |
| 1995 | .21667             | 1.122598               |                                     |               |
| 1996 | .20833             | 1.095218               |                                     |               |
| 1997 | .20833             | 1.068505               |                                     |               |
| 1998 | .20000             | 1.043462               |                                     |               |
| 1999 | .18333             | 1.021000               |                                     |               |
| 2000 | .17500             | 1.000000               |                                     |               |

**INSTRUCTIONS**

Multiply (1) the amount originally refunded times (2) the interest for the remainder of the year in which the refund was issued. Next, place this interest amount in (3) and add this amount to the amount in (1); the sum of (1) and (3) is to be placed on line (4). The balance on line (4) will be the amount for 12/31 of that year. Insert the factor from column 5 for the year in which the refund was issued; then multiply (4) times (5) and place the answer in (6). This is the amount owed as of 12/31 of last year. Next determine (7\*\*) by using the chart below. Take the figure for the month in which the refund is to be repaid (i. e. if refund is being repaid in May use 0.79167%) and place that figure in (7). Finally multiply (6) times (7) and place the interest for the months in the current year in (8). Add this amount to (6) and place the grand total on line (9).

**\*CALCULATION OF (2)**

Take the month that the refund was issued and subtract from 13; then multiply by the factor in column 2 to arrive at the factor. i. e. if the refund was issued on 2/13/74 you would subtract 2 from 13 which equals 11 and multiply by .45 which equals 4.95%

13- \_\_\_\_\_ = \_\_\_\_\_ X \_\_\_\_\_ = \_\_\_\_\_  
 Month of Refund                      Factor (2)                      Amount Line (2)

**\*\*FACTOR FOR LINE (7)**

|          |         |           |         |
|----------|---------|-----------|---------|
| JANUARY  | 0.15833 | JULY      | 1.10833 |
| FEBRUARY | 0.31667 | AUGUST    | 1.26667 |
| MARCH    | 0.475   | SEPTEMBER | 1.425   |
| APRIL    | 0.63333 | OCTOBER   | 1.58333 |
| MAY      | 0.79167 | NOVEMBER  | 1.74167 |
| JUNE     | 0.95    | DECEMBER  | 1.9     |

**PERIODS OF SERVICE COVERED BY REFUND****AMOUNT OF CREDITABLE SERVICE**